

#12
12/27/02
AW

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

In re application of:	§	
Steven R. Jenkins	§	
	§	Attorney Docket No. 8000.53.02
Serial No.: 09/419,327	§	
	§	Customer No. 27683
Filed: October 15, 1999	§	
	§	Group Art Unit: 2177
For: A WEB-ENABLED TRANSACTION AND	§	
MATTER MANAGEMENT SYSTEM	§	Examiner: Dodds, Harold E.

DECLARATION UNDER RULE 37 C.F.R. § 1.132

1. My name is James E. Melson, Jr. I am Chief Executive Officer at Domain Partners, Inc. I was Chief Executive Officer of RealPage Communications, Inc, at the time the acts described in this Declaration occurred. I was engaged as a consultant to the inventor, Steven Jenkins, in connection with development of the subject matter of the present application.

2. All acts described in this Declaration took place in the United States of America.

3. I have read and understand U.S. Patent Application Serial No. 09/419,327 to Steven Jenkins (hereinafter "Application").

4. The subject matter of the Application was disclosed to me by Steven Jenkins prior to February 3, 1998. More specifically, Steven Jenkins disclosed the subject matter of the Application to me (including specifically the subject matter of pending claim 15) in multiple meetings that occurred prior to February 3, 1998. The meetings included discussions on the development of software for the purpose of implementing the subject matter of the Application, including claim 15 as follows:

A software program for implementing a website by which documents can be shared between a service provider and a client, the software program comprising:

instructions for accessing a repository, the repository for storing a plurality of documents;

a first graphical interface by which a first user associated with the service provider can log into the network application, can add one or more documents to the repository, and can assign a category, an authorization, and a matter for each document,

wherein the matter conceptually links a plurality of related documents and information associated with the matter is applicable to each of the plurality of documents;

instructions for identifying one or more clients, each client comprising one or more users having a level of authorization with respect to matters of the client;

an email interface linked to the first graphical interface, the email interface including a list of potential email recipients selected according to at least one client, the category and the matter;

a second graphical interface by which a second user associated with a client can log into the network application and can access one or more of the documents in the repository, based on the category, authorization, and matter for the one or more documents; and

instructions for allowing the second user to view, add, or modify any one of the documents in the repository according to the authorization of the second user with respect to a particular matter.

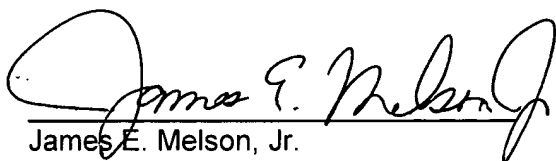
5. The discussions prior to February 3, 1998, included (but were not limited to) the concepts embodied in the design notes attached as Exhibit A. These concepts are the subject matter of the Application. For example, the concepts discussed during the meetings and embodied in the design notes correlate to claim 15 as follows:

Subject matter of claim 15	Subject matter disclosed prior to February 3, 1998, as evidenced by subsequent design notes
A software program for implementing a website by which documents can be shared between a service provider and a client, the software program comprising:	
instructions for accessing a repository, the repository for storing a plurality of documents;	Page 35 illustrates a plurality of documents. Page 38 illustrates a document library.
a first graphical interface by which a first user associated with the service provider	Graphical interfaces are represented throughout the design notes.
can log into the network application,	Logging into a network is inherent given the password and access

	restriction elements (see, for example, pages 41-44).
can add one or more documents to the repository,	Page 35 illustrates a plurality of documents in a graphical interface. These documents may be added by using, for example, the "Document Management" feature illustrated on page 7.
and can assign a category, an authorization, and a matter for each document,	Page 39 illustrates a "New Project Wizard", pages 42-44 illustrate a "New Client Wizard", and page 35 illustrates a plurality of documents. These illustrate embodiments of a category, an authorization, and a matter, respectively.
wherein the matter conceptually links a plurality of related documents and information associated with the matter is applicable to each of the plurality of documents;	Page 35 illustrates such "linked" documents.
instructions for identifying one or more clients, each client comprising one or more users having a level of authorization with respect to matters of the client;	Pages 42-44 illustrate a "New Client Wizard" where users are associated with levels of authorization with respect to client matters.
an email interface linked to the first graphical interface, the email interface including a list of potential email recipients selected according to at least one client, the category and the matter;	Page 23 illustrates an email interface that satisfies these elements.
a second graphical interface by which a second user associated with a client can log into the network application and can access one or more of the documents in the repository, based on the category, authorization, and matter for the one or more documents; and instructions for allowing the second user to view, add, or modify any one of the documents in the repository according to the authorization of the second user with respect to a particular matter.	These elements are satisfied as described on pages 7, 23, 35, 38, 39, 41-44.

5. Because of my meetings with Steven Jenkins prior to February 3, 1998, and the concepts discussed during those meetings, I believe that the subject matter of the Application was invented by Steven Jenkins prior to February 3, 1998.

I acknowledge that willful false statements are punishable by fine or imprisonment, or both, under 18 U.S.C. § 1001, and may jeopardize the validity of this application or any patent issuing from it. I declare under penalty of perjury under the laws of the United States that all statements made of my own knowledge are true and that all statements made on information and belief are believed to be true.


James E. Melson, Jr.

12/9/02
Date

r-36059.1

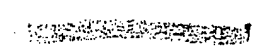
Exhibit A

ns

HIGHLIGHTING KEYS

 set; non-variable

variable; determined by choices in New Client Wizard

 variable; determined by choices in New Project Wizard

Data Input

Reports only; data previously input

Column Key

CLIENT CONNECT

Specific Keys

- Storefront
 - Links to specific areas *direct paths*
 - Return to Storefront
 - Division / All Projects / Project Approach
 - Navigation Tools
- Transaction Management
 - Status
 - Method for Most Current? *Multiple Party Input* *last edit time & date stamp by person?*
 - Issues
 - Template List of Categories of Issues / Client
 - "Hot" Issues *Key*
 - Responsibilities
 - Discuss
 - Collapsible for Concurrent Text
 - Critical Dates
 - Template List of Critical Dates / Client
 - Checklists
 - Specific Checklists / Templates for Client
 - Action
 - Report Accessible by Each Person
 - Working Group
 - Input Form
 - Auto Assign to "WG #s"
- WG #s
 - Horizontal -- 1 line -- Format
- E-mail
 - Easy Access
 - Auto setup -- From
Re -- Client Connect [category]
Date
 - To; CC; BC -- Pop-up Address Lists
Internal Distribution
Distribution Lists *set up default distribution per screen*
 - "Copy" Issue?
- Transaction Management Reports
 - Each "Standard" Report Customizable on Spot *pop-up variable*
 - Data Input in Reports ✓
 - Context Must Show ✓
 - All Projects or Selected (1 or more) Projects ✓

- Status Report
 - "Hot" Issues Report
 - Issues Report
 - Critical Dates Report
 - Checklist Report
 - ^{Action} Active Report
 - Responsibility Report
 - Discussion Report
 - Custom <sup>Melissa review
of case issues</sup>
 - Projects Report
 - Document Management
 - Counsel Information
 - Client Information
 - Library
- Method for Most Current <sup>✓ musty people
time date stamp</sup>
 - Customizable for All or Outstanding Only
 - Customizable for All or Outstanding Only
 - Customizable for Period
 - Customizable for All or Outstanding Only
 - Customizable for All or Outstanding Only
 - Customizable for Each ^{Action} Active Party
 - Customizable for All or Outstanding Only
 - Customizable for Responsible Party
 - Customizable for All or Outstanding Only
 - Customizable for Discussion Party
 - Multiple Options
 - Columns Per Report
 - All Reports ^{automatically for that project}
 - From WP or Acrobat (scanned)
 - Description by Attorney / Client / Staff
 - Searchable by WP or Acrobat
 - Links to actual document or item
 - From WP or Acrobat (scanned)
 - Description by Attorney / Client / Staff
 - Searchable by WP or Acrobat
 - Links to actual document or item
 - From WP or Acrobat (scanned)
 - Description by Attorney / Client / Staff
 - Searchable by WP or Acrobat
 - Links to actual document or item
 - From WP or Acrobat (scanned)
 - Description by Attorney / Client / Staff
 - Searchable by WP or Acrobat
 - Links to actual document or item

CLIENT CONNECT
General Keys

- 2-Way Input / Password Limited *yes*
- Input in Both Transaction Management and Transaction Management Reports *TM will check*
- Input and/or Reports for Attorneys on Multiple Clients *"Files" button - yes*
- Division / All Projects / Projects Approach *TM will check - there OK*
- Storefront / Return to Storefront *yes*
- Navigation Tools: Return to Storefront *on all pages*
 - Working Group #s *all OK*
 - E-mail
 - Files (for Attorneys Only)
- Data Input: Method *HTML - OK*
- Wizards:
 - New Client -- for setup of new client
 - New Project -- for setup of new project
 - Data Input -- for data input *non issue - HTML doesn't report*
 - Password -- for password administration*} "intelligent"*
- Context:
 - e.g., "Project, City, State" throughout
 - Issues Category
 - Specific Transaction Management--e.g., Critical Dates/Action/etc.
- Reports: *Variations of*
~~Customizable~~ in Each "Standard" Report
- Archive: When Complete Project
- Data or File Limits *no issues*
- *• Data Input: In Views for Easy Access *HTML - OK*
- Password: Limitations / Keys *later, major discussion*

COLLABRANET

General Keys

- Input and/or Reports on Multiple Clients

CLIENT CONNECT - CLIENT STOREFRONT

JM - default to division or last used

To permit multi-division access of Archiver Database Administrator

CLIENT CONNECT - CLIENT

DIVISION

ALL PROJECTS

PROJECT

TRANSACTION MANAGEMENT

STATUS

ISSUES

CRITICAL DATA

CHECKLISTS

ACTION

WORKING GROUP

DOCUMENT MANAGEMENT

COUNSEL INFORMATION

CLIENT INFORMATION

LINKS

TM REPORTS

STATUS Report

Hot Issues Report

Issues Report

Critical Data Report

Checklist Report

Action Report

Responsibility Report

Discussion Report

Process Report

Custom Reports

DATA INPUT

Storefront

Working Group #

E-Mail

Files

Note: Navigation tools could be at side

Storefront Button

File Button

to access other files
eg Archiver
PRT
TW
HB
SES

opens storefront page for applicable file
Counsel Query

By Activity ALL Active Items by Client / Project + Active Button
Better if goes to calendar table

Firm Forecast / Link to Unit Level

PRACTICE MANAGEMENT

- Calendar
- Phonebook
- Time Entry
- C/M List
- Dir's Qtr
- T.O. 302

Firm

- HB Apps
- Periods - Firm
- Clients
- BOB

Libby - (CDR)

Donna - Libby

TRANSITION / PRACTICE Mgt

- C/M 177
- TM Structure
- Client Contact

Communication

Key relate to
individual contacts

Client Mgt

- C/M 177
- new client / m. attn. up
- AR / Billing - Elio
- Complaints

Dept

Doc Libby
Rendall

Client Dev

- Current
- Dept
- Firm

Communication

- E-Mail
- Review Dev
- Client Contact

- Consultants
- BOB Dev

Client Connect - Client : STATUS

DIVISION

ALL PROJECTS ☐

PROJECT

Project, City, State

Client STATUS

Control STATUS

☐ Streetfront

☐ Workgroup

☐ E-MAIL

FILE ☐

RP- method for
determining later

Also- Last
Edit Date"

Status

for filter



Done

Project	→	<div data-bbox="121 235 154 262" data-label="Image"></div> <div data-bbox="162 235 219 262" data-label="Text">Status</div> <div data-bbox="219 235 1372 283" data-label="Text">32 & 56 Roland St., Charlestown, MA</div>	
	→	<div data-bbox="194 283 219 304" data-label="Text">A.</div> <div data-bbox="235 283 259 304" data-label="Image"></div> <div data-bbox="267 283 495 315" data-label="Text">Weekly Status Report</div>	
Weekly Report	→	<div data-bbox="251 315 276 336" data-label="Text">1.</div> <div data-bbox="292 315 316 336" data-label="Image"></div> <div data-bbox="324 315 1372 363" data-label="Text">Week of 1/5/98: Inspection Period extended until 1/15/98; Closing scheduled for 2/6/98; Buyer still assessing certain environmental matters.</div>	

Purpose: To view weekly status reports by Project; uses filter to "hide" prior reports; for clients' convenience, uses filter to limit view to only most current

expand to
include
client share

CLIENT CONTACT - CLIENT : ISSUES

Categories =
ALL or
Specific Variables

DIVISION ALL PROJECTS ☐ PROJECT

Category HOT Resp. DISCUSS ATTEMPTED DAUNT

Project, City, STATE

[SUB-Applicant Issues]

1 [Issue]

2 [Issue]

SAT - create
list of
Issues
Categories

☐ Streetfront

☐ Workgroup

☐ E-Mail

FILE ☐

Issues

if U → **Issues**

~ for autoassign rule

Bold = template

	Resp.	Discuss	Attempted	Done	Date
32 & 55 Roland St., Charlestown, MA					
A. Issues Checklist(-)					
1. Input/ Initial Drafting Issues (List):					
2. Local Counsel Issues (List):					
3. Sale Agreement Issues (List):					
a. Section 3.2(a) & 3.9(a) - Brady wants rep from Seller that Seller hasn't received written notices from the govt. as to non-compliance with applicable laws, regulations, etc.					
b. Section 3.3(b) - Brady wants Purchaser's liability limited to "negligence in conducting inspections or tests" rather than simply any claims "arising out of Purchaser's inspections or tests"					
c. Section 3.6(a) - Brady wants to state that Purchaser will give Seller copies of reports, tests, etc. only if Purchaser does not close. He also wants Seller to pay for 1/2 of the cost thereof if Purchaser does not close.					
4. Title/ Survey Issues (List):					
5. Inspection Period Issues (Purchaser Identified) (List):					
6. Closing Issues (List):					

input and

Purpose. to view outstanding issues by Project / type of issues;

for clients' convenience, uses filter to limit view to only outstanding issues

Columns in this view and other views serve specific purposes:

- Resp.: person responsible for issue (POP UP - to assign responsibility)
- Discuss: identity of person to discuss issue with (BDUP - to assign to individual)
Note: assignments are shown in "Discussion View" sorted by Project
- Attempted: "attempted" to discuss (✓ column)
- Done: date stamp (for hide done filter)

Suggested IMPROVEMENT:

- create new view for "Hot Issues" to put limited number of genuinely key (i.e. "deal breaker" issues) in front of senior management

Template

Project and All Projects

Hidden Column
for "Master
Calendar"

Critical Dates

	Resp.	Approved	Discuss	Date	Done	Check	Critical Dates
<input type="checkbox"/> Critical Dates-							
<input type="checkbox"/> 52 & 56 Roland St., Charlestown, MA							
A. <input type="checkbox"/> Sale Agreement Summary-							
1. <input type="checkbox"/> Critical Dates Summary and Checklist-							
a. <input type="checkbox"/> Roland St. - Effective Date (Section 10.3): 19__ (date on which the Title Company executes the Joinder of Title Company following the execution by both Purchaser and Seller)							
b. <input type="checkbox"/> Roland St. - Deposit of Initial Earnest Money (Section 2.2(a)): 19__ (within one business day after the Title Company has received a copy of the Agreement executed by both Seller and Purchaser); note: Purchaser also to deposit with Seller \$100 Independent Consideration							
c. <input type="checkbox"/> Roland St. - Deposit of Additional Earnest Money (Section 2.2(a)): 19__ (within one business day after the expiration of the Purchaser's Inspection Period)							
d. <input type="checkbox"/> Roland St. - Availability of Due Diligence Documents (if date applicable, Section 5.1): 19__ (___ days after Effective Date)							
e. <input type="checkbox"/> Roland St. - Title Commitment/ Title Documents (Section 5.1): 19__ (___ days after Effective Date)							
f. <input type="checkbox"/> Roland St. - Survey (Section 4.1): 19__ (___ days after the Effective Date); note: Agreement does not specify exact date for delivery							

Client ~~CONTACT~~ - CLIENT: CRITICAL DATES

Division

ALL PROJECTS ☐ PROJECT

RESP APPROVED DISCUSE DATE DATE

Project, City, State

1 [Date, Item]

2 [Date, Item]

Template

☐ Streetfront ☐ Working Group ☐ E-Mail Files ☐

JM - need
pop up for
date selection

RP -
for composite
calendar -
must insert
Project Name &
each item

Critical Dates

		Resp.	Approved	Discuss	Date	Done	Check	Critical Dates
m.	<input type="checkbox"/> Roland St. - Special Dates:							
n.	<input type="checkbox"/> Last Edit Date: 1/1/()							

PURPOSE: to track Critical Dates by Project and date item
to create "Master" Calendar of Critical Dates for all Projects

NOTE: Wizard Variable
eg "Closing Checklist"
or "Due Diligence Checklist"

SAT - Create
attached
checklists

Client Counter - Client: CHECKLISTS	
Division	ALL PROJECTS <input type="radio"/> PROJECT <input type="radio"/>
Checklist	Resp Date Approval DRUGS Drugs
Project City State	Received
[ITEM]	
Template	

☐ Stonefront ☐ Working Group ☐ E-MAIL ☐ Files ☐

Template

PROJECT

Checkmark or
date without filter

Due Diligence

205 → ☐ Due Diligence

	Resp.	Date	Approved	Discuss	Done	Check
52 & 56 Roland St., Charlestown, MA						
A. <input type="checkbox"/> Due Diligence Checklist-						
1. <input type="checkbox"/> Seller's Deliveries:						
a. <input type="checkbox"/> Title Information						
1. <input type="checkbox"/> Survey						
2. <input type="checkbox"/> Title Commitment						
3. <input type="checkbox"/> Title Documents (Exceptions)						
b. <input type="checkbox"/> Property Information						
1. <input type="checkbox"/> Environmental Reports						
2. <input type="checkbox"/> Assessments						
3. <input type="checkbox"/> Ad Valorem and Personal Property Tax Bills						
4. <input type="checkbox"/> Notices or Correspondence from Governmental Entities						
5. <input type="checkbox"/> Rent Roll						
6. <input type="checkbox"/> Monthly Operating Statements						
7. <input type="checkbox"/> Certificate(s) of Occupancy						
8. <input type="checkbox"/> Plans and Specifications						
9. <input type="checkbox"/> Service Contracts						
10. <input type="checkbox"/> Summary of Operating Expenditures						
11. <input type="checkbox"/> Licenses						
12. <input type="checkbox"/> Pending Litigation						
13. <input type="checkbox"/> Leases (for non multi-family)						
14. <input type="checkbox"/> Other Documents or Information						
c. <input type="checkbox"/> Other Information						

PURPOSE: 2-way checklist for closing

No filter - Always view entire checklist

Template

Project

checkmark or
date (with initials)

Closing



	Resp.	Date	Approved	Discuss	Done	Check
<input type="checkbox"/> Closing						
→ Project <input type="checkbox"/> 52 & 56 Roland St., Charlestown, MA						
A. <input type="checkbox"/> Closing Checklist-						
1. <input type="checkbox"/> Seller's Deliveries (Section 7.2 (a)):						
a. <input type="checkbox"/> Deed						
b. <input type="checkbox"/> Bill of Sale, Assignment and Assumption- Exhibit C						
c. <input type="checkbox"/> Seller's FIRPTA Affidavit						
d. <input type="checkbox"/> Owner's Title Policy						
e. <input type="checkbox"/> Closing Statement						
f. <input type="checkbox"/> Evidence of Authority						
g. <input type="checkbox"/> Original Leases						
h. <input type="checkbox"/> Assumed Contracts						
i. <input type="checkbox"/> Other Documents Required by Sale Agreement or by the Title Company						
j. <input type="checkbox"/> Tenant Estoppel Certificates						
k. <input type="checkbox"/> Other Documents Identified During Due Diligence Process or by Agreement of Parties						
2. <input type="checkbox"/> Purchaser's Deliveries (Section 7.2 (b)):						
a. <input type="checkbox"/> Purchase Price, plus or minus prorations						
b. <input type="checkbox"/> Bill of Sale, Assignment and Assumption- Exhibit C						
c. <input type="checkbox"/> Closing Statement						
d. <input type="checkbox"/> Evidence of Authority						
e. <input type="checkbox"/> Other Documents Required by Sale Agreement, Seller or by the Title Company						
f. <input type="checkbox"/> Other Documents Identified During Due Diligence Process or by Agreement of Parties						

Purpose: 2-way checklist for closing

No filter - ALWAYS view entire checklist

Date

Active Party =
All Client / Counsel
INDIVIDUALS

Client Counsel - Client		Action	
DIVISION	<input type="text"/>	All Projects	<input checked="" type="radio"/> Project <input type="text"/>
Active Party	<input type="text"/>	Prop	Discuss Attempted Denial
Project City State			
[Active Party Es. H8-Jokers]			
1. [Active Issue]			
2. [Active Issue]			
<div><input type="checkbox"/> Screenfront <input type="checkbox"/> Workgroup <input type="checkbox"/> E-Mail Files <input type="checkbox"/></div>			

RA
cross data
to CN?

Rep / Discuss

WORKING ~~Setup~~ ~~Rep~~

Name

Company

Role

Rep / Discuss

Mailing

Ten

SUS - Define Field

Council : SUS
H+B

RP - input
suggestions

981 Main St. Suite 3100

Dallas TX 75202

~~frank@hugoboss~~

(o) 214-657-8283

(h)

(m)

(F)

(E)

WP Supton

WG #1

WG #2
Project

Name

Company

Role

Telephone

Fax

E-Mail

Joshua Shum R

H+B

Council

NOTE: if "Working Group" is selected in
New Client Wizard, then
"Working Group #s" should be automatically generated
and "Working Group #" button should appear at
bottom of all screens

<u>Client Contact</u> Client: Working Group Numbers					
DIVISION <input type="text"/>	ALL PROJECTS: <input type="radio"/> PROJECT <input type="text"/>				
<u>PROJECT, City, STATE</u>					
<u>NAME</u>	<u>Company</u>	<u>Role</u>	<u>Work #</u>	<u>Fax #</u>	<u>E-MAIL</u>
<div style="border: 1px solid black; height: 200px; width: 100%;"></div>					
<input type="checkbox"/> Streetfront	<input type="checkbox"/> Working Group	<input type="checkbox"/> E-MAIL	Filter <input type="checkbox"/>		

Client Connect - Client

E-MAIL

RP - design capabilities

FORNERS -
NAMES
INTERNAL GROUP
DISTRIBUTION GROUP

To:

CC:

bc:

From:

[User]

Date:

Re:

Client Connect: TRANSACTION MANAGEMENT - ISSUES

PROJECT, CITY, STATE

AUTO: USER

AUTO: default
optim: user specified

RP - ability
to "retain"
E-mails

PURPOSE:

Client/Local server

[illegible]

Discuss how
determine
"Most Recent"
and "Last
Edit Date"

Links : None

P.24

Client Connect - Client: Hot Issues Report

DIVISION

ALL PROJECTS

☐

PROJECT

Resp

Discuss

ATTENDED

Notes

Project, City, State

[Sales Agreement Issues]

1. [Issue]

2. [Issue]

3. [Issue]

☐ Stonefruit

☐ Working Group

☐ E-Mail

Filter ☐

Purpose:

Show all outstanding "Hot" Issues

sorted by Project/Area (eg Issues, Critical Dates)

Hot

ClientConnect-Client: Issues Report

Division All Projects ☐ Project

Category Resp. Discuss Archived Done

Project, City, State

ti: multiple issues categories

[Sale Agreement Issues]

1. [Issue]

2. [Issue]

☐ Strong First

☐ Working Group

☐ E-Mail

Files ☐

Purpose: Show all outstanding "Issues"
Sorted by Issue Category

Client Connect - Client : Critical Data's Report

Division

All Projects

Project

Period

POSP

Approved

Discuss

Date

Solve

Project City State

1. [DATE ITEM]

2. [DATE ITEM]

Template

Strasfrant

Working Group

E-MAIL

Files

default to
net 15 days
ld options 30
45
60
90

LEADS "Done"
column for
input in the
view

Purpose: show items per Critical Dates to be completed in next period - 15 days by default

NOTE: Wizard Variable
eg "Closing Checklist Report" or
"Due Diligence Checklist Report"

Note: Default is
OUTSTANDING
Custom for ALL

Separate
Report for
each checklist

Option =
ALL ITEMS
or Incomplete Items

Client Contact - Client: CHECKLIST REPORT

DIVISION ALL PROJECTS ☐ PROJECT

ITEMS RESP DATE Approved DISCUSS DONE

PROJECT City State
[Checklist]

Received

TEMPLATE

☐ Standard ☐ Workgroup ☐ E-MAIL ☐ FIB ☐

Purpose : to show OUTSTANDING checklist items by default

1

ACTION REPORT

प्रत्यक्ष

Active Party

Resp. .. Date

Discuss

Attempted

Делу

Project City STATE

~~XXXXXX~~ Action Party]

I. - [Active Iron]

2. [Active Tissue]

☐ STORSTROMT

- Working Group

□ E-MIL

F10 ☐

Purpose: to show outstanding Action Items by Action Party

NOTE: Default to Outstanding
Responsibility Items
Custom for ALL ITEMS

CLIENT CONTACT - CLIENT: Responsibility Report

DIVISION ALL PROJECTS ☐ PROJECT

Responsibility RESP ☐ DISCUSS ☐ ATTEMPTED ☐ DONE ☐

PROJECT, CITY, STATE

☐ Storefront ☐ Working Group ☐ E-MAIL ☐ FILES ☐

phases: ALL
or INDIVIDUALS

IF "ALL" - then
show each "name"
as context, then
list Responsibility
Items

JM - can we set
default to "user"
based on password?
or default to
but specified?

Context - eg
Issues
Critical Dates
Checklist

Purpose: to show outstanding Responsibility items
by Responsibility Party

Note: **Default to OUTSTANDING**
Discussion Items
Custom Report for ALL ITEMS

[illegible]

Purpose : to show OUTSTANDING Discussion Items
by Discussion Party

Discussion Report Sample

	Resp.	Attempted	Discuss	Done
<input checked="" type="checkbox"/> A-Huff				
<input checked="" type="checkbox"/> A-Harris				
<input checked="" type="checkbox"/> A-Johnson				
<input checked="" type="checkbox"/> A-Barger				
o 52 & 56 Roland St., Charlestown, MA				
A. o Issues Checklist-				
1. o Sale Agreement Issues (List):				
a. o Section 3.2(a) & 3.9(a) - Brady wants rep from Seller that Seller hasn't received written notices from the govt. as to non-compliance with applicable laws, regulations, etc.	<input checked="" type="checkbox"/> A-Huff		<input checked="" type="checkbox"/> A-Barger	
<input checked="" type="checkbox"/> HB-Jenkins				
<input checked="" type="checkbox"/> HB-Lowry				
<input checked="" type="checkbox"/> HB-Raines				
<input checked="" type="checkbox"/> HB-Hudnall				
<input checked="" type="checkbox"/> HB-Mellon				
<input checked="" type="checkbox"/> HB-Miller				
<input checked="" type="checkbox"/> HB-Wilkinson				
<input checked="" type="checkbox"/> Loc. Counsel				
<input checked="" type="checkbox"/> Purchaser				
<input checked="" type="checkbox"/> P's Counsel				
<input checked="" type="checkbox"/> Title Company				

Purpose: to view issues that relate to a specific person - viewed by Project
Assigned by "Discuss" Column

Client Connect - Client PROJECT REPORT

Division

Project

Show Columns by Report

All Reports

☐ Stonefruit

☐ Working Groups

☐ Email

Files ☐

Discuss
Custom
Reports

Client Computer - Client

CUSTOM REPORTS

Division

ALL PROJECTS

☐

PROJECT

Project, City, State

☐ Statement

☐ Working Group

☐ E-MAIL

File ☐

Client Connect - Client: Document Management

DIVISION ALL PROJECTS ☐ PROJECT

PROJECT, City, STATE

DOCUMENT A [e.g. SALES AGREEMENT]

• Draft #1, dated 1-1-

• Draft #2, dated 1-1-

• Comments, dated 1-1- [description: e.g. Buyer's COMMENTS]

DOCUMENT B

• Draft #1, dated 1-1-

• Execution Form, dated 1-1-

LETTERS

MEMOS

☐ STRENGTH

☐ Working Group

- ☐ E-MAIL

FILES ☐

Consideration to "Issues"

Clicking links to document

Secretarial Input

PURPOSE: Counsel Generated documents

• Explore WP Highlighting tools

Share, especially redlined versions

Client can view/print

Input: Counsel/Counsel staff

Counsel;
Letters
Memos

Links: to specific document

Relationship: Links only

Client Connect - Client: Counsel Information

Division All Projects ☐ Project

Project Name, City, State

Consider "Issues"

☐ Strongfront ☐ Working Group ☐ E-Mail ☐ Files ☐

Purpose: Counsel generated info
highlight where applicable using AROBAT / RE:MARK - 2WAY
Share among working group

Input: Counsel / Counsel Staff

Links: to specific IT or document

Relationship: Links only

Candidates:

- Drafts / MARKUPS
- Title Commitment
- Survey
- Title Policy
- Due Diligence Info

[illegible]

Sgt -
Cousin
"Issues"

Candidates:-

- Working Groups
- Client Checklists
- Other

Lines: To specific Item in Document

RELATIONSHIPS: L.Wcs only

~~Client Contact~~ - Client : Library

Division

F

Forms Library

Closing Binder Library

☐ Strongfront

☐ Working Group

☐ E-Mail

Files ☐

key = Links to specific form / binder

For Use When Adding
New Project for an
Existing Client

NEW PROJECT WIZARD

Key: Must be Able to
Update During
Transaction

	<u>Field Name</u>	<u>Data Input</u>
• Provide Name of Project	Project	Type name
• Provide Name of Project, City and State	Project Name, City, and State	Type name of project, city and state
• Add any new "Responsibility" names for Client / Counsel	Responsibility	Type new names e.g., A - new HB - new
• Add any new "Discussion" names for Client / Counsel	Discuss	Type new names e.g., A - new HB - new
• Add any new "Approved" names for Client / Counsel	Approved	Type new names e.g., A - new HB - new
• Add any new "Action Parties" for Client / Counsel	Action Parties	Type new names e.g., A - new HB - new
• Working Group Additions: Complete WG form for each new Working Group member		
• E-mail		

Password aspects

DATA INPUT WIZARD

RP- can all ~~DATA~~ DATA AB
INPUTED IN SPECIFIC JTBW

eg:

STATUS

Issues

Critical Dates

Checklists

Action

Working Groups

PASSWORD WIZARD

KEY = DEFINING PASSWORD ACCESS capabilities (limitations)

NEW CLIENT WIZARD

	<u>Field Name</u>	<u>Data Input</u>
	Heading	Type name
<ul style="list-style-type: none"> Does Client have different divisions that would use Client Connect? <p>Select <input type="radio"/> Y <input type="radio"/> N</p>		
<ul style="list-style-type: none"> If Yes, then complete by listing divisions <p>[If No, then delete "Divisions" box]</p> <p>Will Client Connect be used for this new client for a single simple project or multiple projects?</p> <p>Select <input type="radio"/> S <input type="radio"/> M</p> <p>[If "S", then delete "All Projects" box]</p>	Divisions	Type name(s) of divisions
<ul style="list-style-type: none"> Complete name(s) of projects 	Project	Type name(s) of projects
<ul style="list-style-type: none"> Select applicable components <ul style="list-style-type: none"> Transaction Management <ul style="list-style-type: none"> Status Issues Critical Dates Checklists Action Working Group Document Management Counsel Information Client Information Library 		

If selected "Transaction Management" components, then select applicable Transaction Management Reports

- o Project Report
- o Status Report
- o Flag Report
- o Issues Report
- o Critical Dates Report
- o Checklist Report
- o Action Report
- o Responsibility Report
- o Discussion Report
- o Custom Reports

- Passwords -- discuss with Melson^{*}
- Should "Issues" be broken down into 2 or more categories?

Select o Y o N

- If Yes, then list categories of "Issues"

Issues Categories

Type issues categories
(e.g., Input/ Initial
Drafting Issues; Local
Counsel Issues; Sale
Agreement Issues)

- Select "Responsibility" parties

can be multiple

- o Client
- o Counsel
- o Local counsel
- o Purchaser
- o Purchaser's Counsel
- o Seller
- o Seller's Counsel
- o Lessor
- o Lessor's Counsel
- o Lessee
- o Lessee's Counsel
- o Broker
- o Title Company
- o Escrow Agent
- o Lender
- o Borrower
- o Surveyor

- For "Client" and "Counsel"

Responsibility

For Client, type first letter or two of Client's name, then hyphen, then last name for each
e.g., A -- Huff
A -- Barger)

For Counsel, type first letter or two of Counsel's name, then hyphen, then last name for each
e.g., HB - Jenkins
HB - Raines

- For "Discussion", please list persons within "Client" and "Counsel" to whom "Discussion" may be assigned

Discussion

For Client, type first letter or two of Client's name, then hyphen, then last name for each
e.g., A - Huff
A - Barger

For Counsel, type first letter or two of Counsel's name, then hyphen, then last name for each
e.g., HB - Jenkins
HB - Raines

- For "Approved", please list persons within "Client" and "Counsel" to whom "Approved" may be assigned

Approved

For Client, type first letter or two of Client's name, then hyphen, then last name for each
e.g., A - Huff
A - Barger

For Counsel, type first letter or two of Counsel's name, then hyphen, then last name for each
e.g., HB - Jenkins
HB - Raines

ADD List of Dots List

Checklists

Action

Working Group

To Do's

• Templates for AOSBT

Issues Categories

Critical DATES

Checklists

• WIZARDS - NEW CLIENT

NEW PROJECT

PASSWORDS

DATA INPUT